User Manual: System Administrator

1. RallyPoint User Types

Members

Members comprise of any cardholder that belongs to an organization. Members may include but are not limited to employees, clients, vendors, Board of Directors; investors' even immediate family if requested. In general, members have a much smaller role than any other user type with regard to the amount of complexity required to run the system. Members have the following capabilities:

- Check-in
- Manage Member Profile
- Send, Receive and Reply to Corporate Messaging
- Receive Corporate Data, such as Documents, Pictures and Video

Departmental Managers

Departmental managers are basic members that also manage a group or several groups of people. Generally you can define departmental managers directly from your organization chart. Every member is directly linked to his/her departmental manager. Departmental managers have the following capabilities:

- Check-in
- Manage Member Profile
- Manage Employee Profiles
- Upload/Store/Share Documents, Pictures & Video
- Create & Manage Events
- Send & Receive Corporate Messaging
- Setup & Maintain Trusted Communication with Clients, Vendors and Media
- Manage Facilities
- View Reports

Facility Mangers

Facility managers are basic members that manage a physical facility/location. Facility managers are tasked with the responsibility to evacuate members located in their facility. Every member should be assigned to a facility manager. Facility managers have the following capabilities:

- Check-in
- Manage Member Profile
- Manage Employee Profiles
- Upload/Store/Share Documents, Pictures & Video
- Create & Manage Events
- Send & Receive Corporate Messaging

- Setup & Maintain Trusted Communication with Clients, Vendors and Media
- Manage Facilities
- View Reports

System Administrators

System administrators are basic members that also have complete system access. Facility managers are often the people in an organization responsible for setting up and maintaining the RallyPoint system. System administrators have the following capabilities.

- Create Communications Tree
- Create Facility Tree
- Manage Skills
- Manage Members
- Manage Company Information
- Manage employee profiles
- Upload/Store/Share Documents, Pictures & Video
- Create & Manage Events
- Send & Receive Corporate Messaging (requires rights)
- Setup & Maintain Trusted Communication with Clients, Vendors and Media
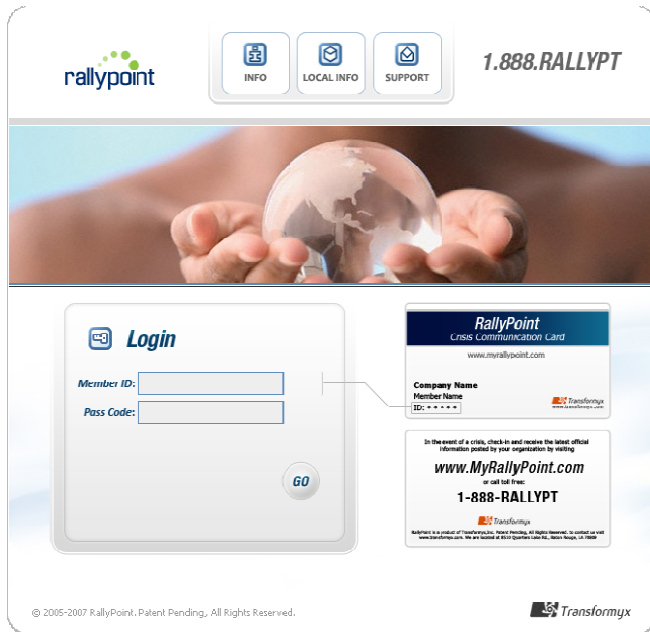- Manage Facilities

Getting Started

2.   How to Access your RallyPoint Account

Your organization cares about its people and has implemented RallyPoint into its emergency preparedness and recovery plan. In the event of an emergency, you will receive an alert via text message and/or email. Using your RallyPoint Crisis Communication Card, you are able to check in with your manager(s), receive vital recovery information, and deliver messages informing your manager of your status and location.

Using your RallyPoint Crisis Communication Card
Your RallyPoint member card contains login information for Online and Phone Access:

The front of the card contains the company name, member name, and member ID number . This information is used when accessing RallyPoint.

The back of the card serves as an instructional piece displaying the web address to the online application and the toll free number to the call center.

2.1   Online Access

To access your RallyPoint account, first open an Internet browser and type into the address bar www.myrallypoint.com.

2.2   Phone Access

To access your RallyPoint account, from any working phone, dial **1-888-RALLYPT (1-888-725-5978).**

Your initial login information for Online & Phone Access:

Member Id:
This can be found on your RallyPoint issued member card.

Pass Code: ****
The pass code can be any 4 numbers you choose.
We recommend that you use the last 4 digits in your social security number, however it is not required.

2.3   Phone Check In and Usage for a Manager

To access your RallyPoint account, from any working phone, dial **1-888-RALLYPT (1-888-725-5978).**

Once you dial the number, you will hear the voice attendant and will be asked to provide some information to verify your identity.

Press 1 for a payphone
Press 2 for any other phone

Enter your **Member Id:** xxx*xxxxxxxx

This can be found on your RallyPoint issued member card.

Pass Code: ****
The pass code can be any 4 numbers you choose.
We recommend that you use the last 4 digits in your social security number, however it is not required.

Once verified you will then hear the **Company** message as well as your **Manager** message.

Press 1 to leave a check-in message for your manager

Press 2 to leave an announcement message for your direct reports

Press 3 to hear your check in messages from your members

Press 7 to leave a global company message

2.4   Record a check-in message for your manager

Press 1 to record your 60 second *check-in* message
Press 9 to disconnect

To record a check-in message you will be prompted to enter your current location 5 digit zip code. RallyPoint can geo-code your current location on a map for your management team to view.

Enter the *zip code* and then *press #*.

RallyPoint will then prompt you to decide if you can return to work.

Press 1 if Yes
Press 2 if No

After this, you will be asked if you would like to record a voice message for your check in. You will have 60 seconds to record this message, press # when you are finished.

Press 1 to review your message
Press 2 to re-record your message
Press 3 to deliver the message

Once you deliver your check-in message, you will be asked what other messages you would like to leave.

Press 1 for your direct reports
Press 2 to leave a Global Company Message
Press 7 to disconnect

2.5 Leave an announcement for your members

RallyPoint will give you 60 seconds to record this message. Press # when you are finished.

Press 1 to review your message
Press 2 to re record your message
Press 3 to deliver the message to your direct reports

2.6 Listen to your members check-in messages

Remember that only new check in messages will be heard from this option. You will hear the first message on the IVR. After listening to your message, you can:

Press 1 to repeat the message
Press 2 for the next message
Press 3 to return to main menu

2.7 Leave a global company message

You will have 60 seconds to record a company-wide message, press pound when you are finished.

Press 1 to review your message
Press 2 to re record your message
Press 3 to deliver a global company message if you have rights

As a manager, you can also hear all of your member check in messages via the website at
www.myrallypoint.com

3.   Navigating RallyPoint

RallyPoint is an extremely sophisticated and powerful system, but it was created with the end user in mind. Any employee can easily learn to navigate the basic features of the system in only a few minutes.

3.1   Main Navigation
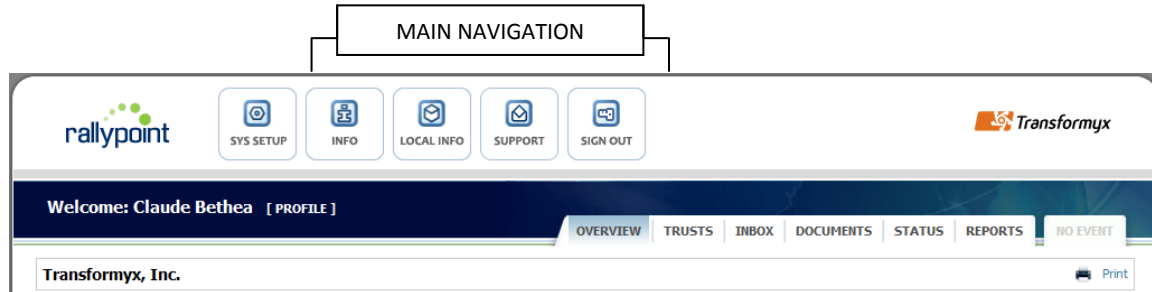
4.   SYS SETUP

SYS SETUP	This option only appears for System Users and allows access to the System Setup menus.
INFO	The **INFO** icon will open a new window, bringing the user to www.myrallypoint.net where he/she can learn more about the features and capabilities of RallyPoint.
LOCAL INFO	Clicking the **INFO** icon allows the users to view RallyPoint features, unique characteristics, current threats via news feeds and a contact form.
SUPPORT	By clicking the **SUPPORT** icon, the user has access to a contact form along with a comment box. A toll-free contact number to speak to a RallyPoint representative is also provided.
SIGN OUT	The user signs out of the system by simply clicking the **SIGN OUT** icon.

System Setup is only accessible by system administrators. Click the SYS SETUP icon in the main nav. This is the section where the company's communication & facility structures are setup and managed. The tabs in this section include:
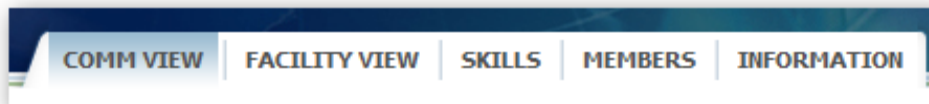
COMM VIEW	The COMM VIEW is where the communication structure is built. This responsibility includes entering information for department, managers, members and tree levels.
FACILITY VIEW	The FACILITY VIEW is where the physical locations are entered and stored and facility managers are assigned.
SKILLS	The SKILLS section is where the skills and certifications are created.
MEMBERS	The MEMBERS tab allows the system administrator to upload a member list or individually enter members into the system, assigning specific skill sets, member groups and system rights.
INFORMATION	The INFORMATION section is where public information is managed including logo, contact information, website, company description and alternate site information.

4.1 COMM VIEW

The Communication View is the section where the communication structure is built and managed. A RallyPoint employee assists the system administrator in the initial setup.
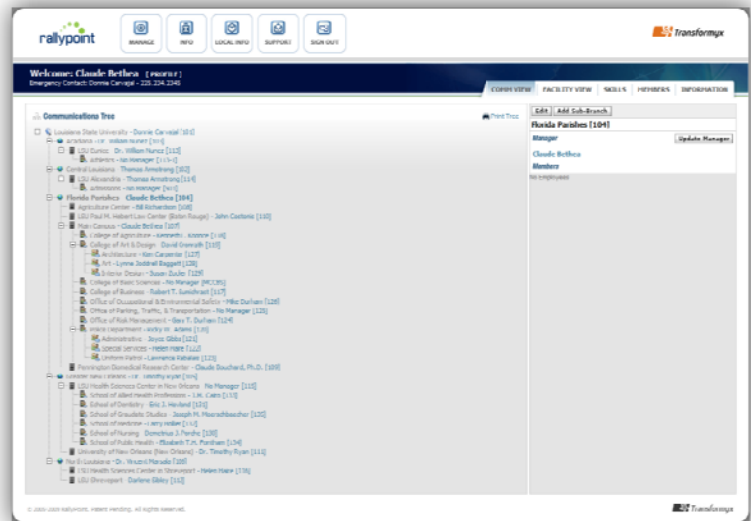
4.1.1 Building the Communication Tree / Adding Levels

The company name is set as a default for the top level of the tree. Click on the level to view its details.

Click **Add Sub-Branch** to add a level under the selected branch. Enter the name and internal code in the provided fields. Click **Save/Add** **SAVE/ADD** to insert the level into the communication tree.

4.1.2 Editing Tree Levels

To edit a level of a tree, click on the desired level. The information will appear to the right. Click **Edit**. Edit the name and/or internal code in the fields provided.

4.1.3 Moving Levels

Select the level of the tree to be moved and click **Edit**. Move the level by selecting the location in the drop down menus. Understand that if the level being moved contains sub levels, the sub levels are moved with its parent level. Once the desired location is selected, click **Save/Add**.

4.1.4 Updating Communication Tree Manager

To update the manager of a level, click on the desired level and click Update Manager. A light box will appear. Use the drop down menu to select the status of the desired user, then click the first letter of the user's last name. A list of names will appear. Select the names desired then click Update/Save
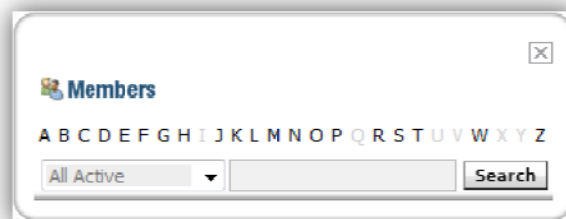
4.1.5 Deleting a Tree Level

Note: To delete a level of the communication tree, the level cannot contain members or sub level(s).
Select the level to be deleted. The information will appear to the right. Click the Delete.

4.2 FACILITY VIEW

From the System Setup side, Click the FACILITY VIEW tab. Facility View is where the physical locations are entered into RallyPoint. The locations' address, phone number, and manager(s) are stored here.

4.2.1 Adding Facilities

Select the existing facility. Click and enter the requested information in the fields required. If the facility does not have a physical address, select the check box "This facility DOES NOT have a physical address". Once the form is completely filled out, click Save. A window will appear verifying the physical address. If the address is incorrect, click CANCEL and make necessary corrections, if not, click Save.

4.2.2 Updating Facility Manager/Sub-Manager

Select the Facility and click Update Manager, light box will appear. Use the drop down menu to select the appropriate member status then select the first letter of the member's last name being searched. A list of names will appear. Select the name of the member desired, then click. If you choose to set the facility to "no manager", click "set to no manager". Follow the same steps to update the Secondary Facility Manager.
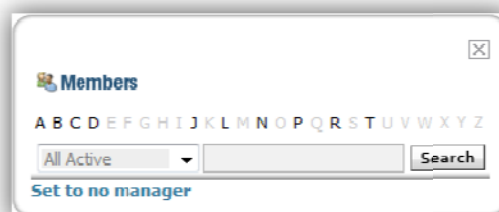
4.3 SKILLS

The Skills section is where skills and crafts are entered into RallyPoint. These pre-entered skills and crafts will later be assigned to members in the system.

4.3.1 Adding Skills

Input the name of the skill or craft in the provided field. Select the "Request Certification" check box if the skill requests a certification.

Click [Update/Save] and the skill will be added into the system.
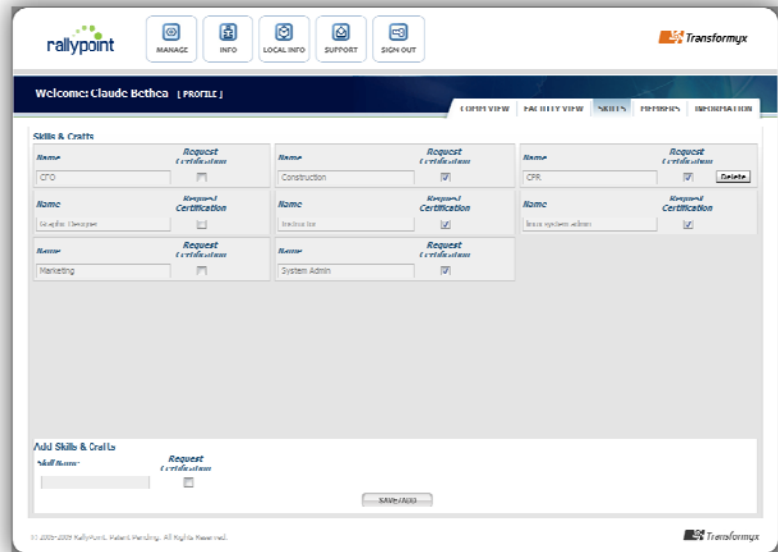
4.4 MEMBERS

Several tasks can be performed in the Members section but it is primarily where the System Administrator adds members and changes their status in RallyPoint.

4.4.1 Uploading Members

Click [Upload Members], then select [Browse...]. A window will appear to locate the file. Click [Upload] for the file to be uploaded into the system. It must be a .CSV file to be accepted. If an error occurs, a RallyPoint staff member will send an alert along with the necessary corrections.
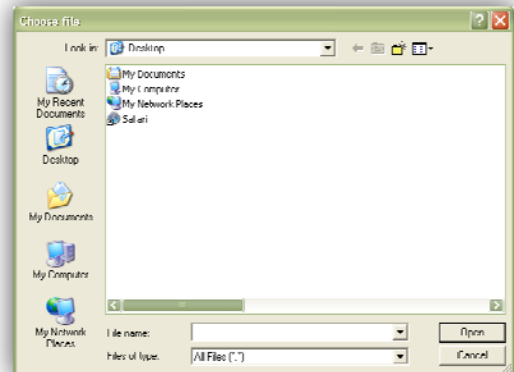
4.4.2 Adding Members

Click on [Add Member]. A form will appear. Provide the necessary information. A description of each field is provided below:

Note: An asterisk indicates a required field

*First Name	Enter the member's First Name
*Last Name	Enter the member's Last Name
Nickname	Enter the member's display name if known by another name
Title	Enter the member's work Title
*Last 4 of SSN	Enter the member's last 4 digits of SSN – stored as pass code
*Member ID	Enter the member's employee ID – must be unique
Communication Tree	Enter the member's location in the comm. Tree using the drop down menus provided
*Facility	Enter the Facility the member belongs to using the drop down menu provided
System User Access	Select the check-box if the member is assigned system administrator rights
Company Wide Msg Sending	Select the check-box if the member is assigned companywide messaging rights
Suppress Company Wide Msg	Select the check-box if the member should not receive company messaging

Once the form is complete, click [Save/Add].

4.4.3 Member Search

There are several ways to search for a member:

Search Field

Using the drop down menu, select the appropriate member status. Enter the last name of the member or click on the first letter of the last name being searched. Click the Search icon. Select the desired name from the list given.

Search by Tree Level

navigate through the communication tree by selecting the levels. Each level selected will display the level's manager and members. Once the member is found, click the name.

Changing the Member Status

Once the member is selected, manipulate the desired status using the Employee Status drop down menu then click [Update/Save]. The statuses include:

All	Targets both active & inactive members
All Active	Targets all active members in the system
All Inactive	Targets all inactive members in the system
Never Logged In	Targets all members who have never accessed their RallyPoint
Managers	Targets all managers in the system
Members	Targets all members in the system

4.4.5 Member Groups
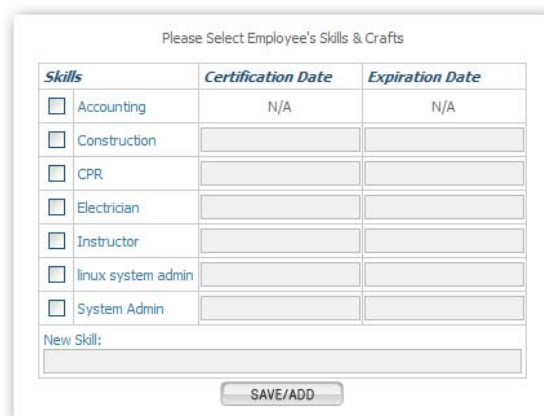
Once the member is selected, click the Change icon for "Member Group". A light box will appear displaying pre entered groups. Enter the group name in the given field if the group is new. Click the check box next to the group to assign the member to it.

4.4.6 New Card Request

Select the member's name needing a new crisis communication card. Click the "Request new card" check box and select Save/Add. A new card will be automatically be ordered and sent to you.

4.4.7 Assigning Skills & Crafts

Locate and select the appropriate member. Select the "Change" icon next to Skills. A list of pre entered skills will appear. Click the box next to the assigned skill. If the skill requests a certification, enter the dates required. Click Save/Add.

4.5   INFORMATION

From SYS SETUP, click the INFORMATION tab. This section is where the company's public profile is setup and managed. This information is available in the online business directory.

4.5.1   Upload Company Logo

Click the Browse… icon below the words "Please Upload a Logo". A window will appear to locate the file.

Once the file is found, double click or select "Open". Click [Save/Add] and the logo will be added to your RallyPoint.

4.5.2   Company Status

The company status section is the status shown for public information. This status will be displayed in RallyPoint's business directory. There are 5 settings available: *No Threat, Alert, Evacuate, Recovery and Return.* Click [Save/Add] and the company status will be updated.

4.5.3   Changing Company Status

The company status in the "INFORMATION" section is the status displayed in the RallyPoint business directory. Choose from the following options: No Threat, Alert, Evacuate, Recovery and Return. Click Save/Add and the status will be updated and available for public viewing.

4.5.4   Company Description

The organization's description is entered in the Company Description field. This information is stored in the company's profile available in RallyPoint's Business Directory. Click Save/Add and the information will be stored in the company's profile.

4.5.5   Alternate Site Information

Coming soon

4.5.6   Public Contact Info

Complete the fields with contact information for the business directory. Click Save/Add and the information will be stored in the business directory.
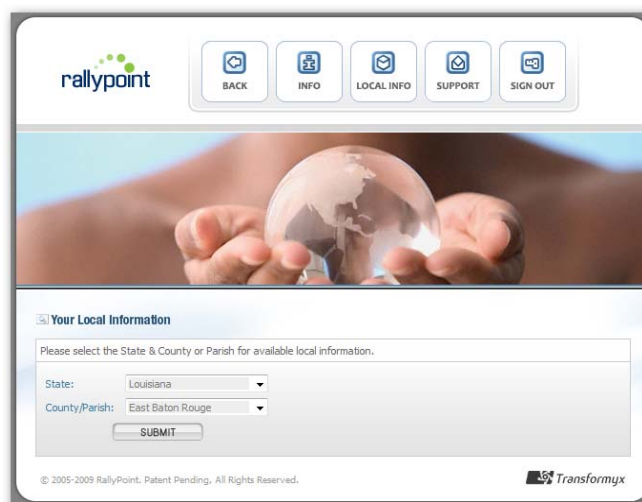
Public Contact Info:	Description	Phone Number	Email Address
General Info:		(225) 761-0088	
Sales Info:			
Support Info:			
Other Info:			
Emergency Info:			

5.   INFO

The INFO icon at the top of the page opens www.myrallypoint.net in a new window. Information including testimonials, whitepapers and automated demonstrations can be found here.
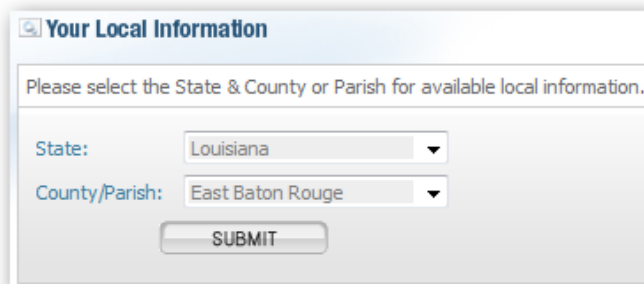
6.   LOCAL INFO

The LOCAL INFO section allows the user to view critical links by location, searching the state and county/parish desired. This can be used to obtain up to date information regarding location's status, work, emergency response, etc…

Finding Local Information

Using the drop down menus, select the desired State and Parish then click [Submit]. A page loads with links to local authority's websites.
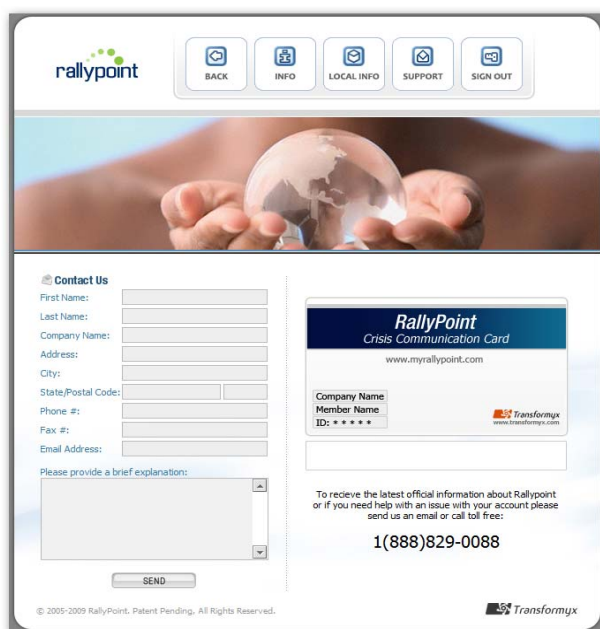

7.   SUPPORT

The SUPPORT page provides users with information needed to assist with RallyPoint card and usage as well as contact information for a RallyPoint representative. Complete the available form with any questions or concerns and click [Send] This information is sent to a RallyPoint representative who will respond immediately.

8.   SIGN OUT

Click the SIGN OUT icon at the top of the page to sign you out of the application.